

TAA: New Training Plan

Find participant – check both name and SSN if someone is not found. *Always make sure all necessary info is on the application and registration screens*

Add new plan

1. Service Screen – add new service
 - a. Date: start of training
 - b. Service/Activity Title, search
 1. category: TAA
 2. service type: Occupational Training, Remedial, OJT, or Customized training as appropriate
 - c. Funding Stream: TAA
 - d. Summary Description: TAA training plan
 - e. Planned End Date: training end date
 - f. Service Note: type of training/degree, school and cost
2. Add HCTC or extend end date of current HCTC service. If you are not able to change the end date because of prior ownership, contact the state TAA coordinator.
3. Case Notes: enter your justification for approving this plan. Be thorough. This is be an area the monitor's check. You must make a logical tie in between this person's skills, abilities, occupations in demand, proposed employment, school choice, etc. You have to justify, justify, justify.
4. The waiver will need to be revoked effective the start of training.

HINT: You can group several like transactions so you can cut and paste your service notes.

Send training plan to state TAA for approval and inclusion in the file.